AGILIA

User Manual

CONTACT

07.11.2005

Welcome

Thank you for purchasing AGILIA software. This user manual will introduce you to the most important functions of AGILIA in a quick and efficient way.

This part of the manual describes the handling of the module: **Contact**

Please read the following manual thoroughly. Should you have questions nevertheless, please do not hesitate and contact our support: support@ebit.at, +43 732 602232-50.

In reference to our products we provide trainings. In case of interest we willingly send you a detailed description of our trainings. Do you have any questions? Send us an e-mail at: office@ebitonline.com or call us at: +43 732 602232.

Note: The views of the displayed menus, menu items and screenshots may possibly differ from your actual screen view – depending on your individual settings, your rights in AGILIA and on the modules you have purchased.

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1 General Information

With the module Contact you can conduct, monitor and report outbound campaigns.

Precondition for conducting an outbound campaign is that all profiles which should be contacted are already available in the system and have been selected (with the target group selection).

In this part of the user manual you will find the description of the parts that deal with conducting and reporting of outbound campaigns in AGILIA.

Where Do I Find the Menu Item Contact?

In the menu CONTACT you have the choice between following menu items:

CONTACT DESK, PROJECT ADMINISTRATION, CONTACT MONITOR and REPORTS.

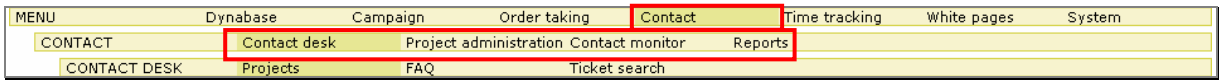

Figure 1: Menu contact

2 Contact Desk

Here you learn to conduct and use a project (outbound action).

2.1 Select and Use Project

In the menu CONTACT, menu item CONTACT DESK you find the list of outbound projects which are assigned to the logged in user under the menu item PROJECTS.

Note: Via the outbound action symbol in the icon box you receive the selection of active outbound action (as far as follow ups are due). Here you can select the desired action as well and are getting to the CONTACT DESK menu.

2.1.1 Step 1 – Select Project

Sales action 2006 - Sales action 2006
Sales-Action 2006 - Outbound
Sales-Action 2006 - outbound2
Sales-Action 2006 - outbound3
test - Outbound 2005
Next >>

Figure 2: List of active outbound actions

Select the desired campaign and click on Next >>.

2.1.2 Step 2 – Search Profiles or Start Project

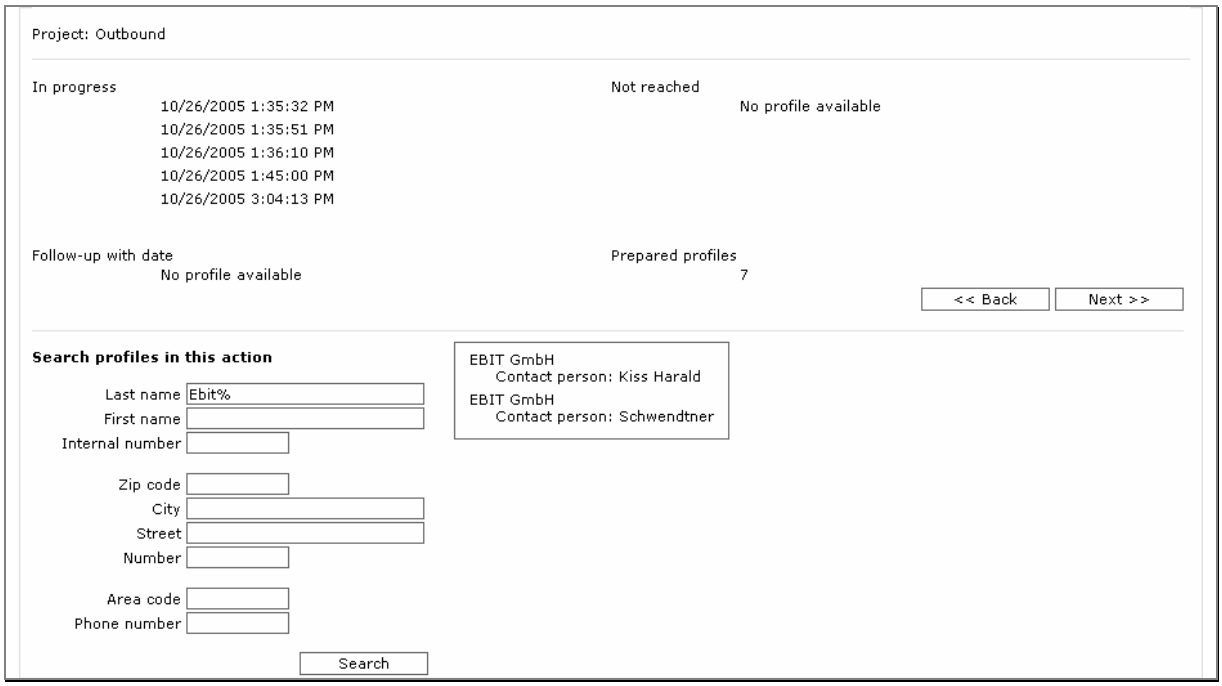

Figure 3: Search profile or start project

In the following step you see some details for the selected project. Click on Next >> to start the project.

You are able to search and directly select certain profiles from the used target group.

Note: For searching use the wildcards which are commonly used in AGILA (mainly %).
Note: You have to select the additional setting "with inbound" when creating a new campaign in the menu CAMPAIGN in order to get the search dialog for profiles displayed.

2.1.3 Step 3 – Conduct Project

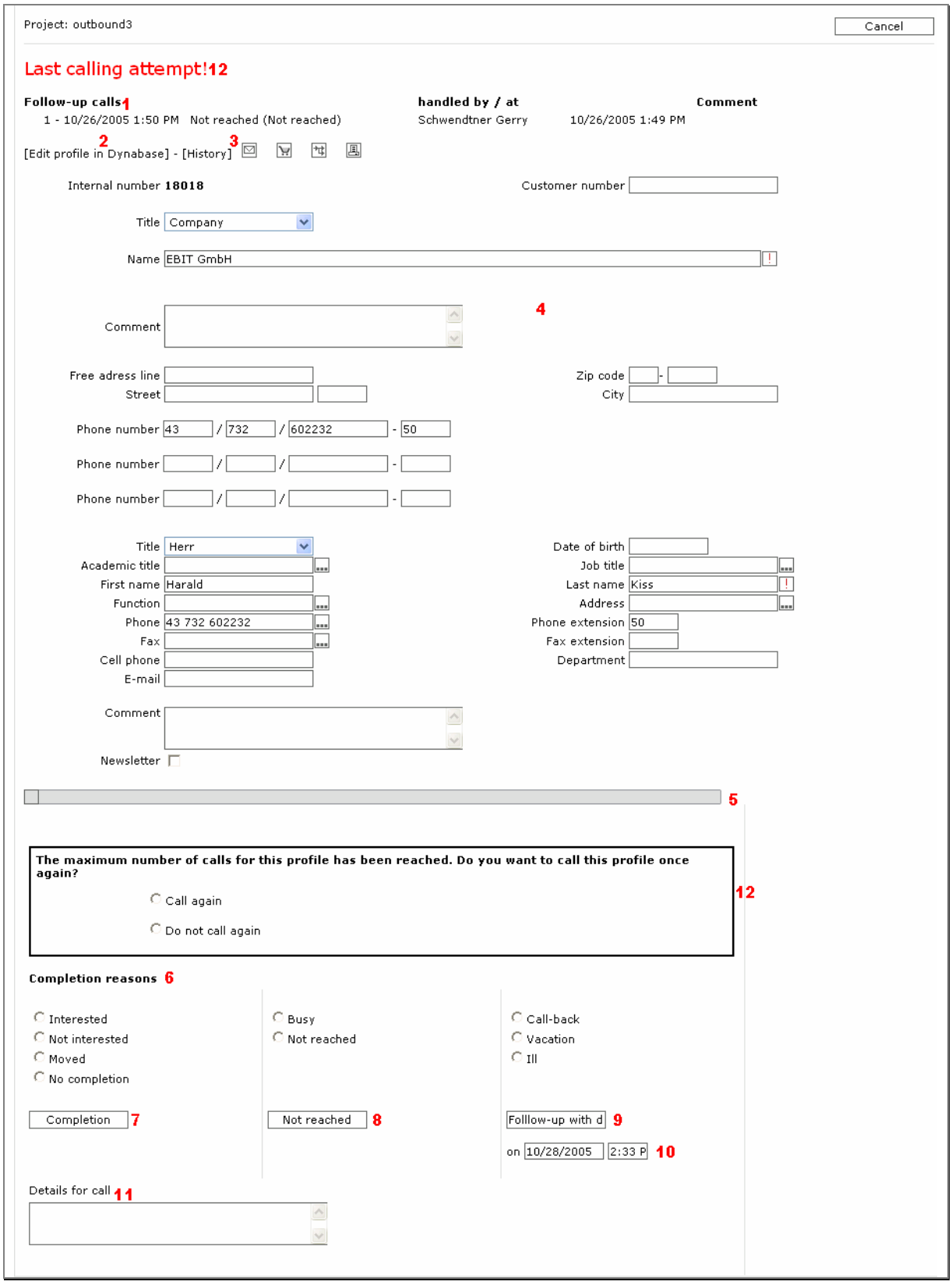

Figure 4: Conduct project

Note: Please note that this view might vary from your campaign (questionnaire). This depends on the settings you choose when creating a campaign.

1 Here you see at most the last three follow ups with their processing details. You see the number of call attempt including date and time, the completion reason (with exact reason in brackets), the use who has processed it with date /time as well as comments.

2 You are able to edit the profile in Dynabase in case you can not manage with the displayed fields.

3 You can examine the history of this profile, send an e-mal or take an order for this profile.

4 If necessary you can add and complete profile data.

5 Complete the questionnaire.

Note: Please note that at this position there is usually a questionnaire – which was left out for lack of space.
Note: You can specify the settings of the questionnaire when creating a campaign.

6 Here you find the list of completion reasons per completion group. Select one completion reason (radio button in the categories "Completion", "Not reached" or "Follow-up with date") and click on the corresponding button – by doing so you close the dialog.

Note: You can change the settings of completion reasons in the menu "Completion group", in the menu SYSTEM, menu item MASTER DATA.

7 With Completion you finish the contact with the selected completion reason – this profile will not be provided again with a follow up in this action.

8 With Not reached you state a follow up reason. This profile will be provided again to the user after a previously (in the outbound action) defined time has run out.

9 With Folllow-up with d you can define that the profile is not provided after the preset time but only after the time which the user is selecting for this particular profile.

10 You can enter a desired follow up date and time when using "Follow-up with date".

11 You can add a comment to the call; this will be displayed when the profile is provided the next time with a follow up. You see it in the upper screen.

Now you have successfully processed one profile from the outbound action and you receive a new profile for processing.

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3 Reports

In this part of the user manual you find the description of the reports from the module Contact.

In the menu CONTACT you find the menu item REPORTS. Here you have the choice between OUTBOUND and TICKET FLOW REPORTS.

3.1 Outbound

Here you learn which settings you can define for the different outbound reports.

3.1.1 Outbound Results

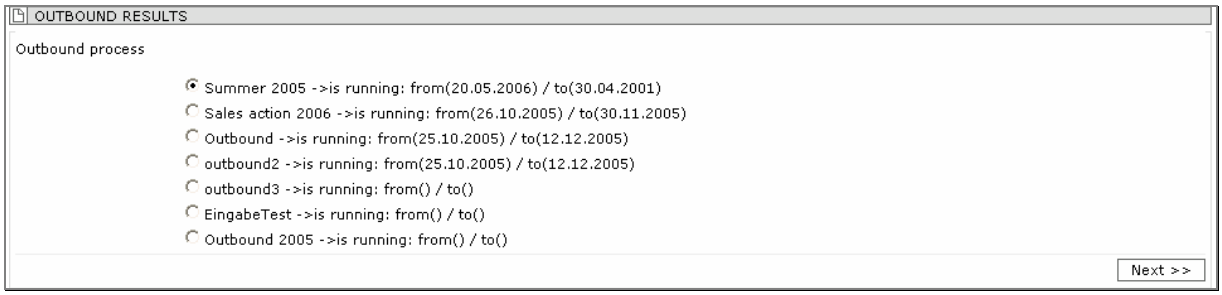

OUTBOUND RESULTS
Outbound process
Summer 2005 ->is running: from(20.05.2006) / to(30.04.2001)
Sales action 2006 ->is running: from(26.10.2005) / to(30.11.2005)
Outbound ->is running: from(25.10.2005) / to(12.12.2005)
outbound2 ->is running: from(25.10.2005) / to(12.12.2005)
outbound3 ->is running: from() / to()
EingabeTest ->is running: from() / to()
Outbound 2005 ->is running: from() / to()
Next >>

Figure 5: Outbound results – Outbound process

Select the desired outbound process for which you want to start the report.

Click on Next >> to get to the next step of the report.

Figure 6: Outbound results – Period of time

Select the desired period of time for which you want to start the report. Additionally select whether the report applies for the whole or only for a specific time span.

Click on Next >> to get to the next step of the report.

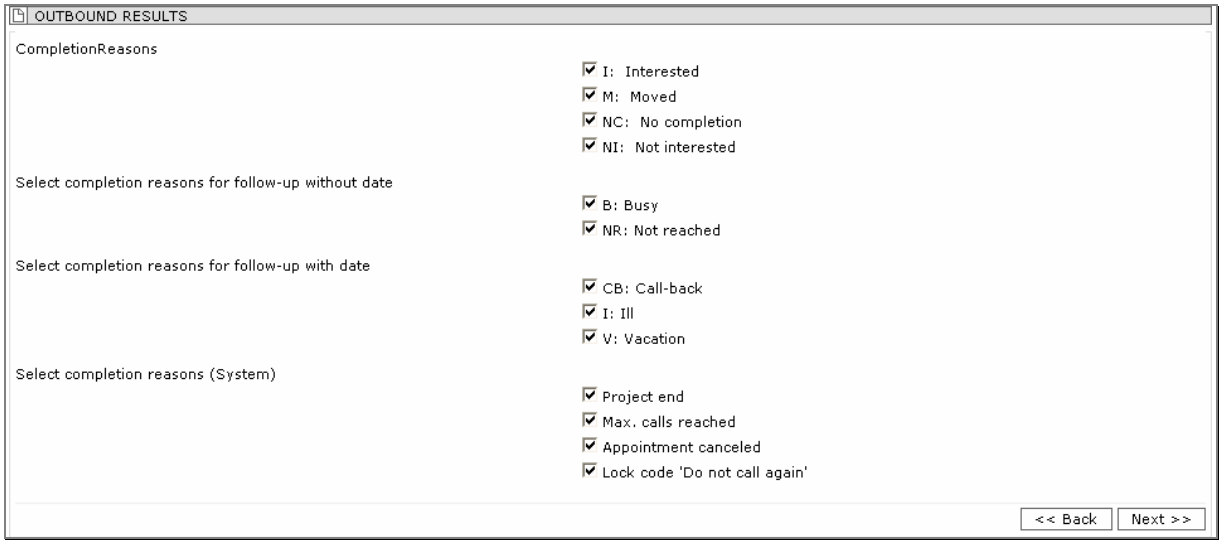


Figure 7: Outbound results – Completion reasons

Select the desired completion reasons of the outbound action which should be considered and displayed in your report.

Click on Next >> to get to the next step of the report.

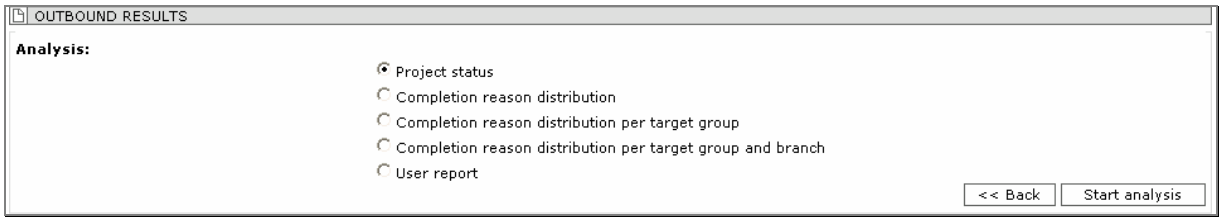
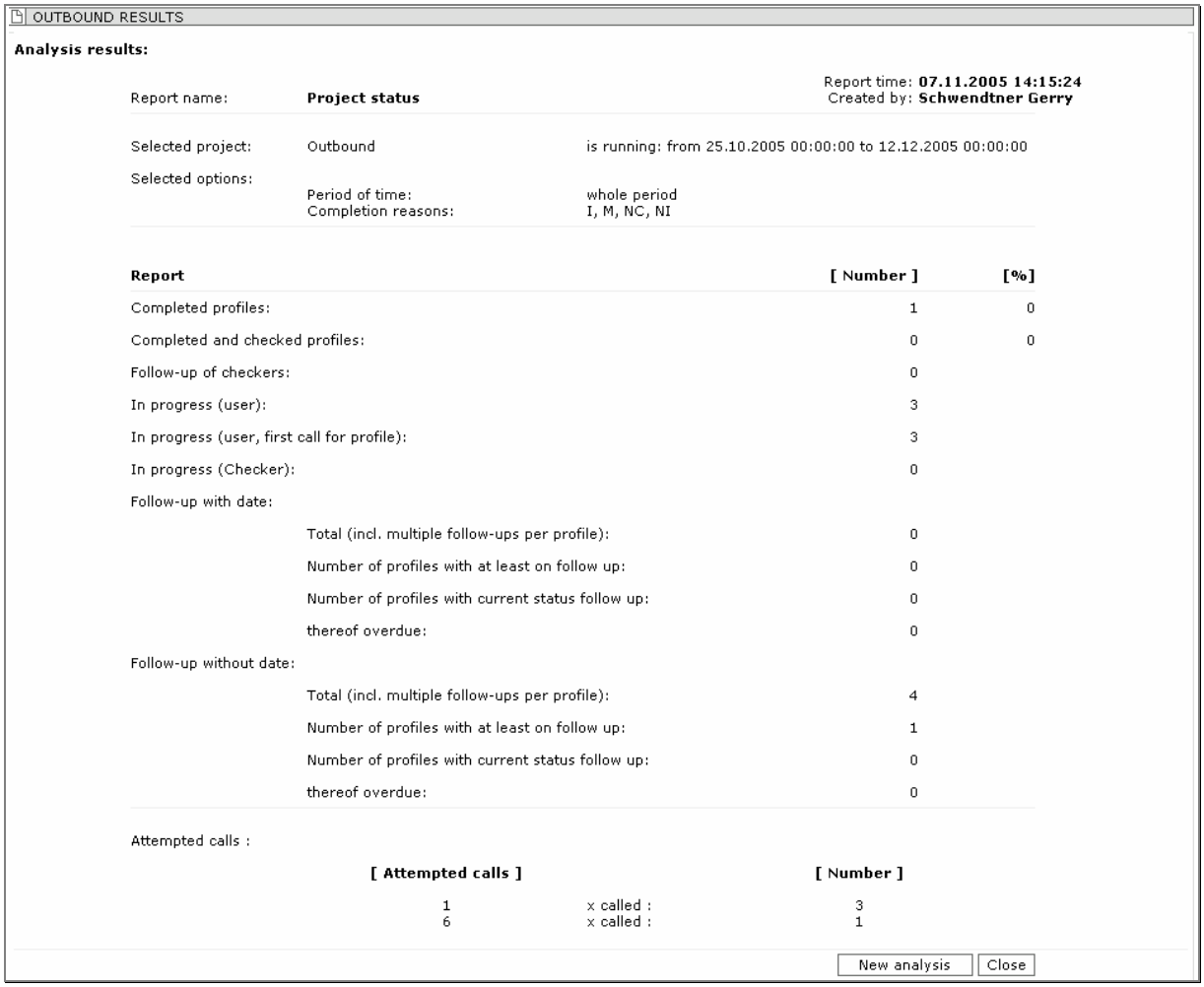


Figure 8: Outbound results – Analysis types

You can choose now which predefined analysis types you want to take for the report:

- Project status
- Completion reason distribution
- Completion reason distribution per target group
- Completion reason distribution per target group and branch
- User report

3.1.1.1 Project Status



OUTBOUND RESULTS

Analysis results:

Report name: **Project status**

Report time: **07.11.2005 14:15:24**
Created by: **Schwendtner Gerry**

Selected project: Outbound — is running: from 25.10.2005 00:00:00 to 12.12.2005 00:00:00

Selected options:
Period of time: whole period
Completion reasons: I, M, NC, NI

Report	[Number]	[%]
Completed profiles:	1	0
Completed and checked profiles:	0	0
Follow-up of checkers:	0	
In progress (user):	3	
In progress (user, first call for profile):	3	
In progress (Checker):	0	
Follow-up with date:		
Total (incl. multiple follow-ups per profile):	0	
Number of profiles with at least on follow up:	0	
Number of profiles with current status follow up:	0	
thereof overdue:	0	
Follow-up without date:		
Total (incl. multiple follow-ups per profile):	4	
Number of profiles with at least on follow up:	1	
Number of profiles with current status follow up:	0	
thereof overdue:	0	

Attempted calls :

[Attempted calls]		[Number]
1	x called :	3
6	x called :	1

New analysis | Close

Figure 9: Outbound results – Project status

The "Project status" report is summarizing the outbound action with a few key numbers. Also the number of call attempts is shown.

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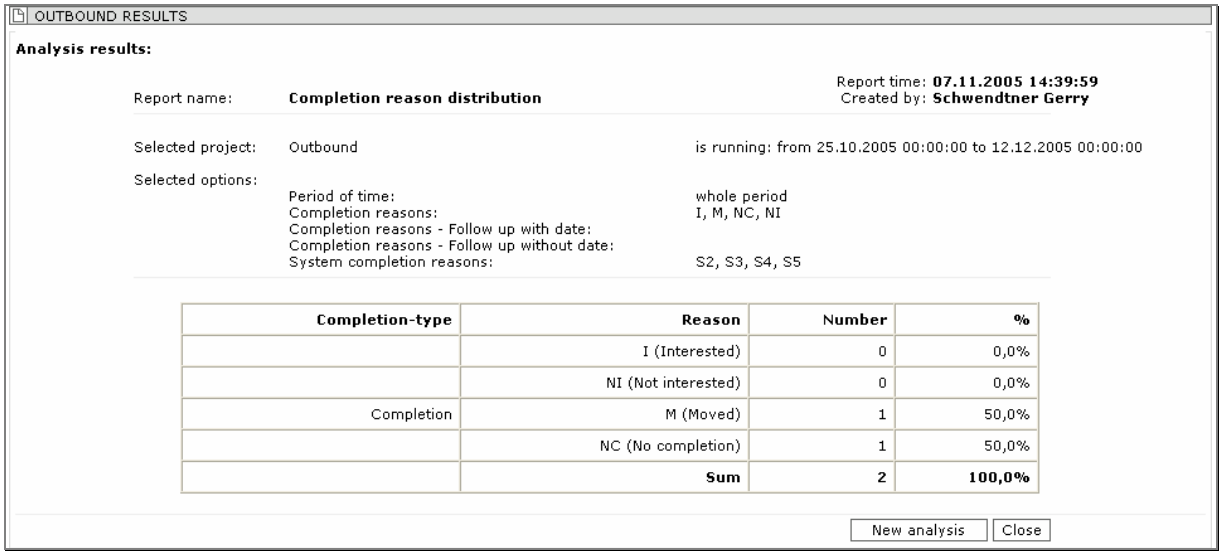
3.1.1.2 Completion Reason Distribution



OUTBOUND RESULTS

Analysis results:

Report name: **Completion reason distribution**

Report time: **07.11.2005 14:39:59**
Created by: **Schwendtner Gerry**

Selected project: Outbound — is running: from 25.10.2005 00:00:00 to 12.12.2005 00:00:00

Selected options:

Period of time:	whole period
Completion reasons:	I, M, NC, NI
Completion reasons - Follow up with date:	
Completion reasons - Follow up without date:	
System completion reasons:	S2, S3, S4, S5

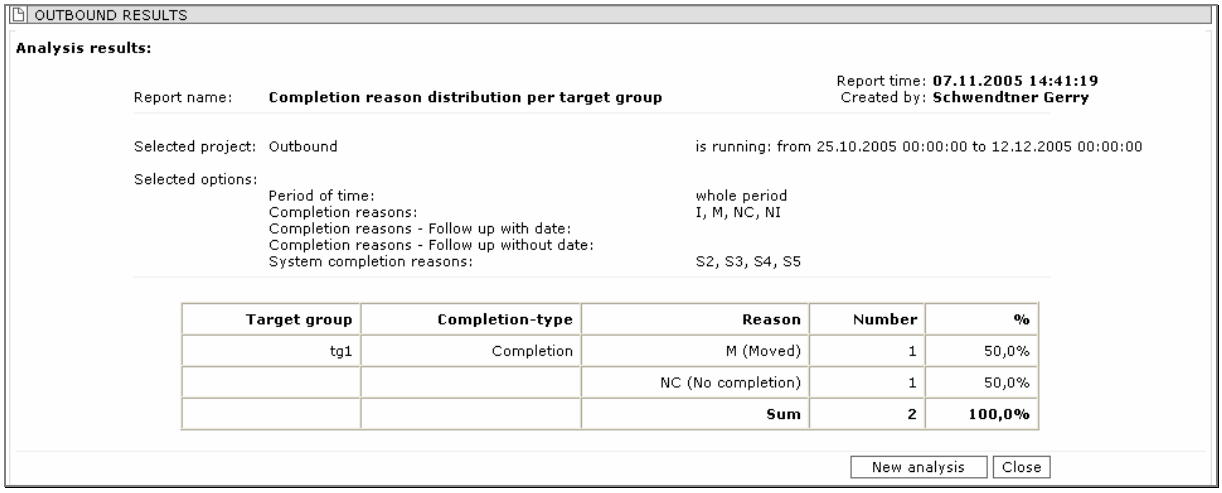
Completion-type	Reason	Number	%
	I (Interested)	0	0,0%
	NI (Not interested)	0	0,0%
Completion	M (Moved)	1	50,0%
	NC (No completion)	1	50,0%
	Sum	**2**	**100,0%**

New analysis | Close

Figure 10: Outbound results – Completion reason distribution

The "Completion reason distribution" report is summarizing the outbound action per completion reason in absolute and relative numbers. Relative numbers are calculated from the sum of displayed values.

3.1.1.3 Completion Reason Distribution per Target Group



OUTBOUND RESULTS

Analysis results:

Report name: **Completion reason distribution per target group**

Report time: **07.11.2005 14:41:19**
Created by: **Schwendtner Gerry**

Selected project: Outbound — is running: from 25.10.2005 00:00:00 to 12.12.2005 00:00:00

Selected options:

Period of time:	whole period
Completion reasons:	I, M, NC, NI
Completion reasons - Follow up with date:	
Completion reasons - Follow up without date:	
System completion reasons:	S2, S3, S4, S5

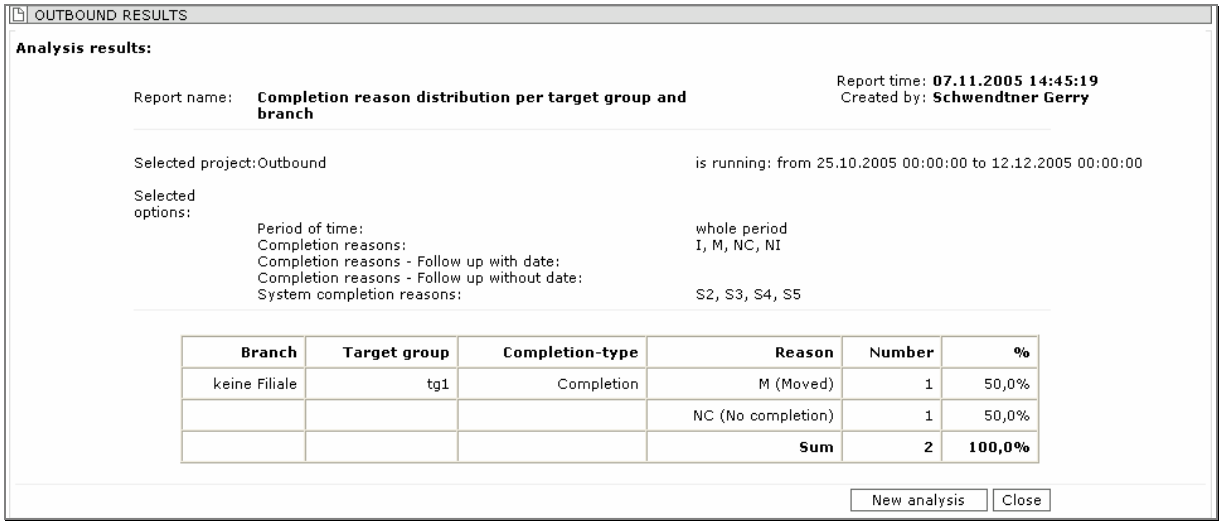
Target group	Completion-type	Reason	Number	%
tg1	Completion	M (Moved)	1	50,0%
		NC (No completion)	1	50,0%
		Sum	**2**	**100,0%**

New analysis | Close

Figure 11: Outbound results – Completion reason distribution per target group

The "Completion reason distribution per target group" report is summarizing the outbound action per target group and completion type or reason in absolute and relative numbers.

3.1.1.4 Completion Reason Distribution per Target Group and Branch



OUTBOUND RESULTS

Analysis results:

Report name: **Completion reason distribution per target group and branch**

Report time: **07.11.2005 14:45:19**
Created by: **Schwendtner Gerry**

Selected project: Outbound — is running: from 25.10.2005 00:00:00 to 12.12.2005 00:00:00

Selected options:

Period of time:	whole period
Completion reasons:	I, M, NC, NI
Completion reasons - Follow up with date:	
Completion reasons - Follow up without date:	
System completion reasons:	S2, S3, S4, S5

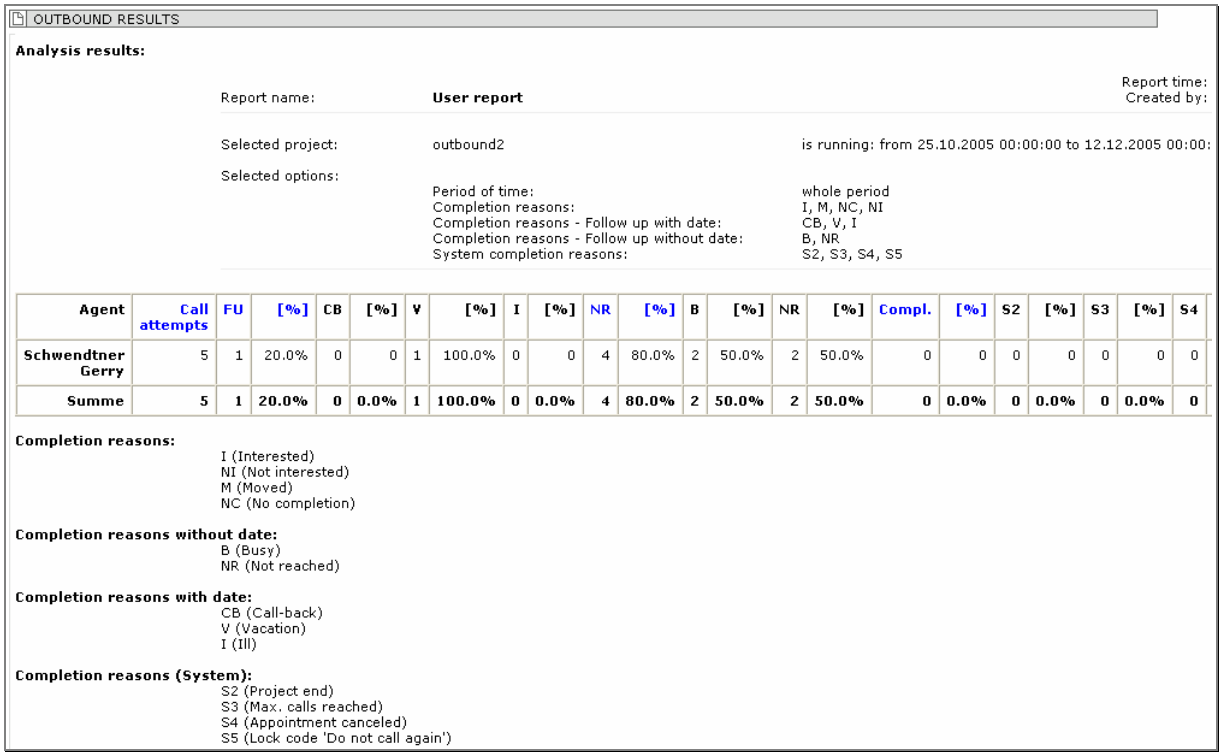
Branch	Target group	Completion-type	Reason	Number	%
keine Filiale	tg1	Completion	M (Moved)	1	50,0%
			NC (No completion)	1	50,0%
			Sum	**2**	**100,0%**

New analysis | Close

Figure 12: Outbound results – Completion reason distribution per target group and branch

The "Completion reason distribution per target group and branch" report is summarizing the outbound action per target group and completion type or reason in absolute and relative numbers per branch.

3.1.1.5 User Report



OUTBOUND RESULTS

Analysis results:

Report name: **User report**
Report time:
Created by:

Selected project: outbound2 is running: from 25.10.2005 00:00:00 to 12.12.2005 00:00:

Selected options:

Period of time:	whole period
Completion reasons:	I, M, NC, NI
Completion reasons - Follow up with date:	CB, V, I
Completion reasons - Follow up without date:	B, NR
System completion reasons:	S2, S3, S4, S5

Agent	Call attempts	FU	[%]	CB	[%]	V	[%]	I	[%]	NR	[%]	B	[%]	NR	[%]	Compl.	[%]	S2	[%]	S3	[%]	S4
Schwendtner Gerry	5	1	20.0%	0	0	1	100.0%	0	0	4	80.0%	2	50.0%	2	50.0%	0	0	0	0	0	0	0
Summe	**5**	**1**	**20.0%**	**0**	**0.0%**	**1**	**100.0%**	**0**	**0.0%**	**4**	**80.0%**	**2**	**50.0%**	**2**	**50.0%**	**0**	**0.0%**	**0**	**0.0%**	**0**	**0.0%**	**0**

Completion reasons:
I (Interested)
NI (Not interested)
M (Moved)
NC (No completion)

Completion reasons without date:
B (Busy)
NR (Not reached)

Completion reasons with date:
CB (Call-back)
V (Vacation)
I (Ill)

Completion reasons (System):
S2 (Project end)
S3 (Max. calls reached)
S4 (Appointment canceled)
S5 (Lock code 'Do not call again')

Figure 13: Outbound results – User report

The "User report" is breaking down the outbound action per user into completion reasons in absolute and relative numbers.

Note: Relative numbers (in %) are calculated from the absolute numbers. They refer to the number of call attempts (e.g. User "Kiss Harald" – 169 NR (Not reached) correspond to 41.8% of his total 383 call attempts).

In the lower screen you find a description of all abbreviations of completion reasons.

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3.1.2 Assignment Report

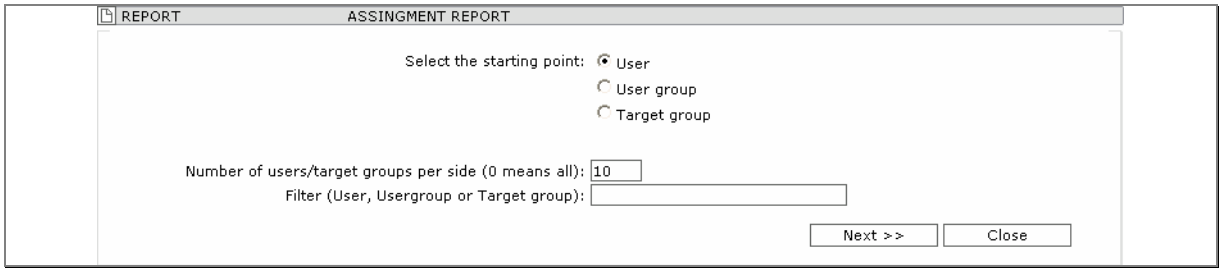


Figure 14: Assignment report – Settings

Select a starting point for the report – you can choose between:

- User
- User group
- Target group

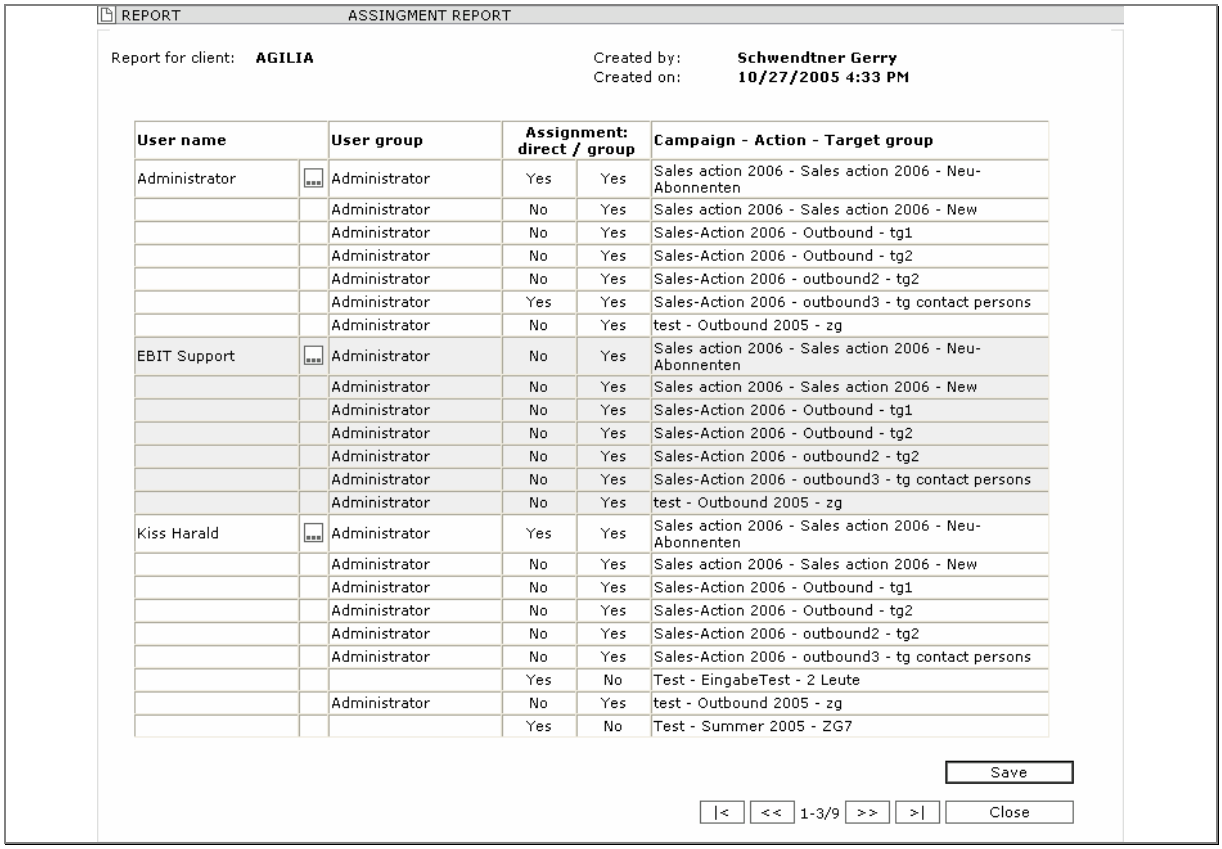
You can limit the number of users/target groups per side.

Note: If you enter "0" this means that all users/target groups are displayed on one side.

You can set filters by entering the name of a user for example. The report is only considering the stated value from the filter.

Click on Next >> to get to the next step of the report.

3.1.2.1 User



REPORT ASSINGMENT REPORT

Report for client: **AGILIA**

Created by: **Schwendtner Gerry**
Created on: **10/27/2005 4:33 PM**

User name		User group	Assignment: direct	Assignment: group	Campaign - Action - Target group
Administrator		Administrator	Yes	Yes	Sales action 2006 - Sales action 2006 - Neu-Abonnenten
		Administrator	No	Yes	Sales action 2006 - Sales action 2006 - New
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg1
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg2
		Administrator	No	Yes	Sales-Action 2006 - outbound2 - tg2
		Administrator	Yes	Yes	Sales-Action 2006 - outbound3 - tg contact persons
		Administrator	No	Yes	test - Outbound 2005 - zg
EBIT Support		Administrator	No	Yes	Sales action 2006 - Sales action 2006 - Neu-Abonnenten
		Administrator	No	Yes	Sales action 2006 - Sales action 2006 - New
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg1
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg2
		Administrator	No	Yes	Sales-Action 2006 - outbound2 - tg2
		Administrator	No	Yes	Sales-Action 2006 - outbound3 - tg contact persons
		Administrator	No	Yes	test - Outbound 2005 - zg
Kiss Harald		Administrator	Yes	Yes	Sales action 2006 - Sales action 2006 - Neu-Abonnenten
		Administrator	No	Yes	Sales action 2006 - Sales action 2006 - New
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg1
		Administrator	No	Yes	Sales-Action 2006 - Outbound - tg2
		Administrator	No	Yes	Sales-Action 2006 - outbound2 - tg2
		Administrator	No	Yes	Sales-Action 2006 - outbound3 - tg contact persons
			Yes	No	Test - EingabeTest - 2 Leute
		Administrator	No	Yes	test - Outbound 2005 - zg
			Yes	No	Test - Summer 2005 - ZG7

Save

|< << 1-3/9 >> >| Close

Figure 15: Assignment report – User

In the result of the report you see which user and user group is assigned to which campaign and target group.

Note: In case a user group is assigned to a campaign/target group all users (members) are automatically assigned, too. If a user is directly assigned to a campaign/target group the user is still a member of it even when the user group is not assigned to the campaign/target group any more.

You can make changes by clicking the dot button ▪ of the relevant field. A new window is opened. There you can change the assignments, click on Save to secure the changes.

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3.1.2.2 User Group

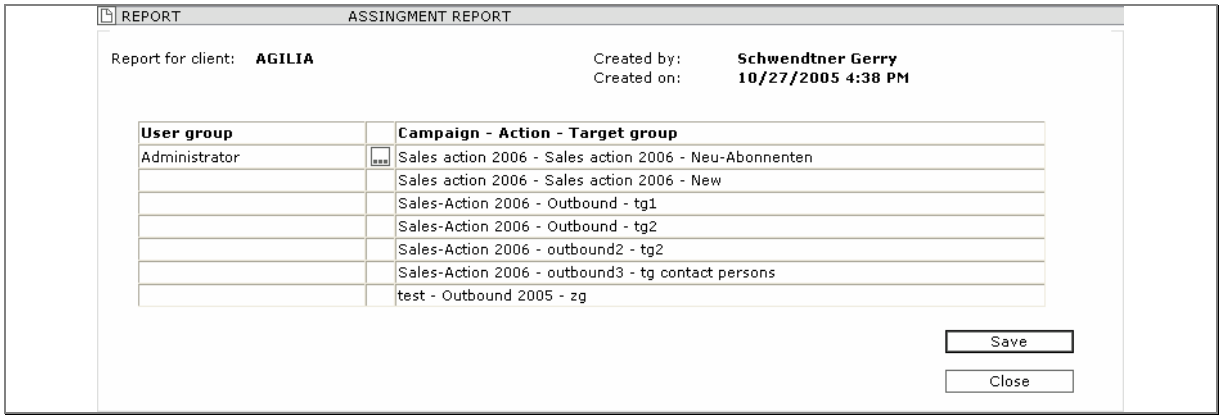

REPORT
ASSINGMENT REPORT
Report for client: AGILIA
Created by: Schwendtner Gerry
Created on: 10/27/2005 4:38 PM
User group
Campaign - Action - Target group
Administrator
Sales action 2006 - Sales action 2006 - Neu-Abonnenten
Sales action 2006 - Sales action 2006 - New
Sales-Action 2006 - Outbound - tg1
Sales-Action 2006 - Outbound - tg2
Sales-Action 2006 - outbound2 - tg2
Sales-Action 2006 - outbound3 - tg contact persons
test - Outbound 2005 - zg
Save
Close

Figure 16: Assignment report – User group

In the result of the report you see which user group is responsible for which campaign.

You can make changes by clicking the dot button ... of the relevant field. A new window is opened. There you can change the assignments, click on Save to secure the changes.

3.1.2.3 Target Group

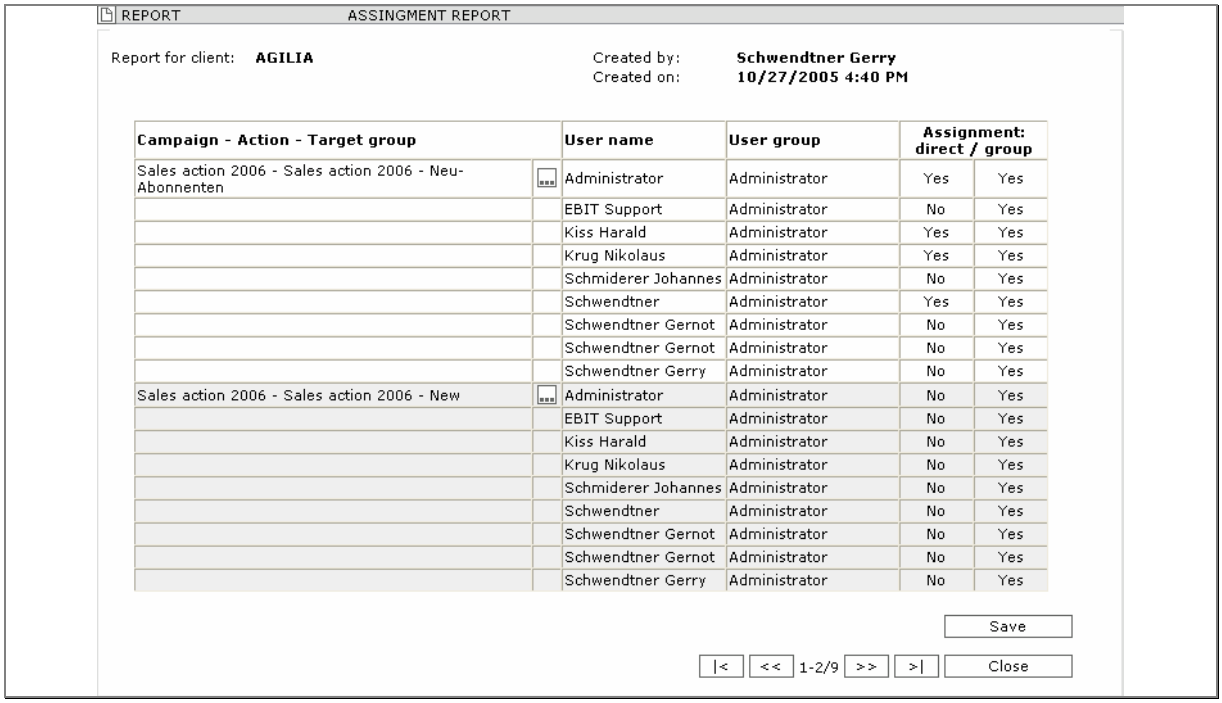


Figure 17: Assignment report – Target group

In the result of the report you see which target group is assigned to which campaign and users/user groups.

Note: In case a user group is assigned to a campaign/target group all users (members) are automatically assigned, too. If a user is directly assigned to a campaign/target group the user

is still a member of it even when the user group is not assigned to the campaign/target group any more.

You can make changes by clicking the dot button ... of the relevant field. A new window is opened. There you can change the assignments, click on Save to secure the changes.

3.1.3 Ticket Duration Report

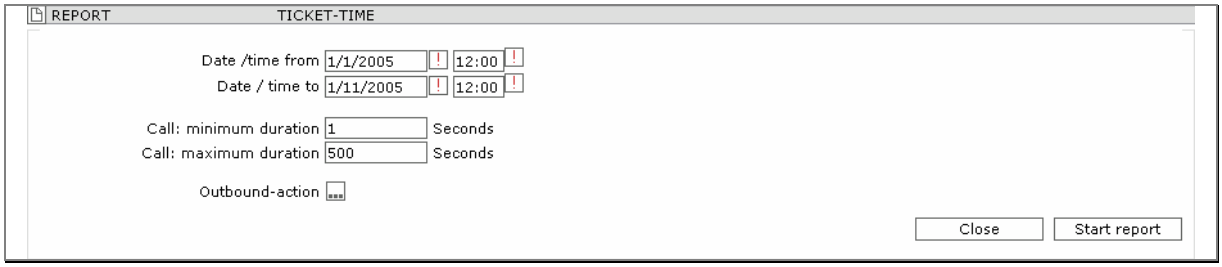


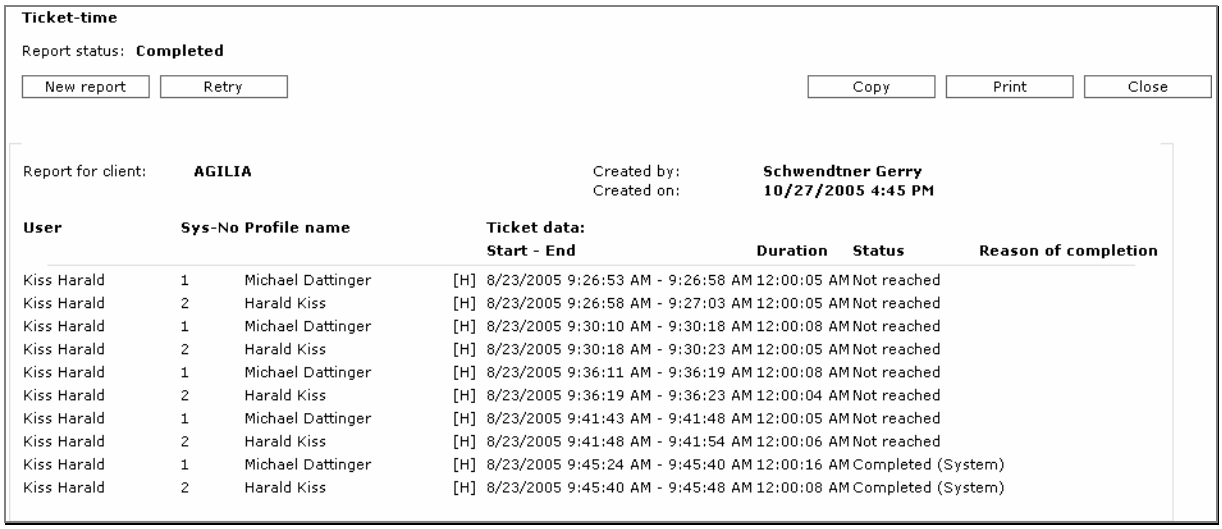
Figure 18: Ticket duration report – Settings

You have to enter start and end date for the report (date and time).

Define the minimum and maximum duration of calls.

Select at least one or more outbound actions. Click on the dot button ... and select the desired action(s).

Click on Start report to start the report.



User	Sys-No	Profile name	Ticket data: Start - End	Duration	Status	Reason of completion
Kiss Harald	1	Michael Dattinger	[H] 8/23/2005 9:26:53 AM - 9:26:58 AM	12:00:05 AM	Not reached	
Kiss Harald	2	Harald Kiss	[H] 8/23/2005 9:26:58 AM - 9:27:03 AM	12:00:05 AM	Not reached	
Kiss Harald	1	Michael Dattinger	[H] 8/23/2005 9:30:10 AM - 9:30:18 AM	12:00:08 AM	Not reached	
Kiss Harald	2	Harald Kiss	[H] 8/23/2005 9:30:18 AM - 9:30:23 AM	12:00:05 AM	Not reached	
Kiss Harald	1	Michael Dattinger	[H] 8/23/2005 9:36:11 AM - 9:36:19 AM	12:00:08 AM	Not reached	
Kiss Harald	2	Harald Kiss	[H] 8/23/2005 9:36:19 AM - 9:36:23 AM	12:00:04 AM	Not reached	
Kiss Harald	1	Michael Dattinger	[H] 8/23/2005 9:41:43 AM - 9:41:48 AM	12:00:05 AM	Not reached	
Kiss Harald	2	Harald Kiss	[H] 8/23/2005 9:41:48 AM - 9:41:54 AM	12:00:06 AM	Not reached	
Kiss Harald	1	Michael Dattinger	[H] 8/23/2005 9:45:24 AM - 9:45:40 AM	12:00:16 AM	Completed (System)	
Kiss Harald	2	Harald Kiss	[H] 8/23/2005 9:45:40 AM - 9:45:48 AM	12:00:08 AM	Completed (System)	

Figure 19: Ticket duration report – Result

In the result of the ticket duration report you see the duration of the single tickets and the most important details for them for a (limited) period of time.

You can print, copy or rerun the report.

If you click on the profile name a new window is opened with the data of the profile (like in Dynabase). You can make changes and see the details if necessary.

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If you click on [H] a new window is opened with the history of the profile. You see the outbound call tickets of the profile and can access them here.

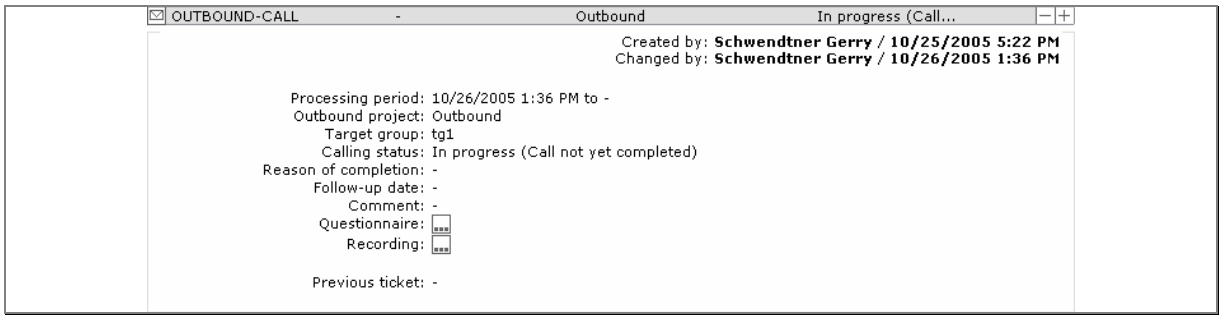
OUTBOUND-CALL - Outbound In progress (Call...
Created by: Schwendtner Gerry / 10/25/2005 5:22 PM
Changed by: Schwendtner Gerry / 10/26/2005 1:36 PM
Processing period: 10/26/2005 1:36 PM to -
Outbound project: Outbound
Target group: tg1
Calling status: In progress (Call not yet completed)
Reason of completion: -
Follow-up date: -
Comment: -
Questionnaire:
Recording:
Previous ticket: -

Figure 20: History

3.1.4 Outbound Contact-Monitor

Figure 21: Outbound contact-monitor – Select client(s)

Select at least one client for whom you want to start the contact monitor. Click on the dot button of the field "Client".

Note: This selection is depending on your rights in AGILIA.

Click on Start report to start the report.

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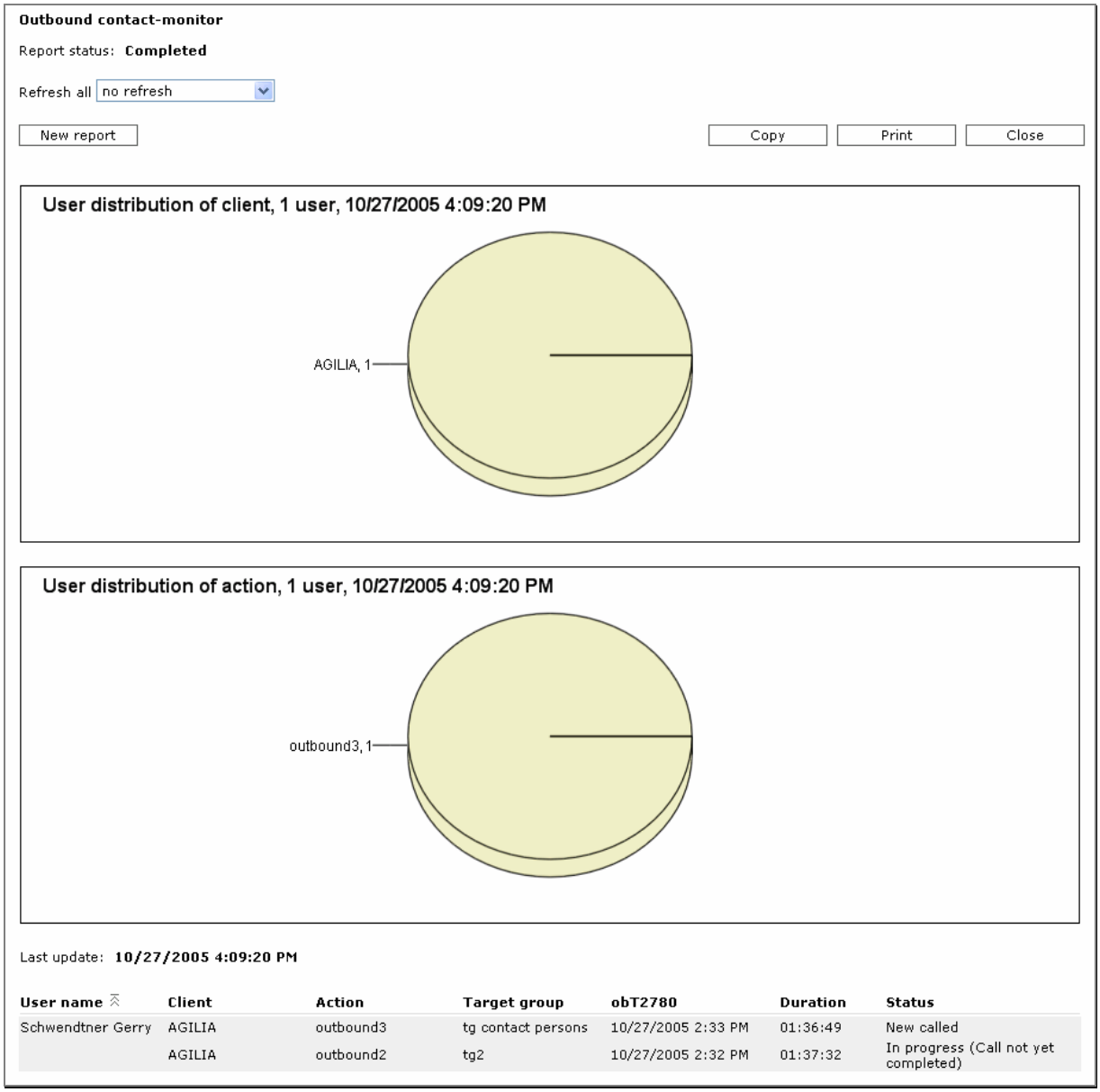

Figure 22: Outbound contact monitor – Result

In the result of the outbound contact-monitor you see the user distribution per selected user and per action. It is displayed as a diagram chart.

You see the user name with the details on the screen of those users who are/were active in the client(s), i.e. those who are currently processing an outbound ticket.

In the upper part of the screen you can set if and how often the monitor should be refreshed. Select a value from the list "Refresh all".

You can sort the result by user name – therefore use the buttons ⩔⩖.

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